



www.TCLFinancialTaxServices.com • E-MAIL: clientservices@TCLFinancialTaxServices.com

4317 ROBINSON ROAD (HIGHWAY 18) • POST OFFICE BOX 59051 • JACKSON, MISSISSIPPI 39284
OFFICE: (601) 922-2TCL (2825) • FAX: (601) 922-2003

January 14, 2023

BrittiNi Eation, Charity Rogers, Debra Perkins, Katherine Thompson, Marion Canada, Prince Trotter, Jr., Quanda Brooks, Sequoia Blocker, Shikeitha Robinson, Dr. Tamekia Stewart, Tommie Smith, Veronica James, Victoria Louisville:

Team, many of you are already familiar with this document, but for the Team Members that began employment last year, you are probably wondering, “What are these six pages that I am being asked to read?”

Every year, as a tradition, I write what I call, “Tim’s State of Address.” Inside this address, I discuss five objectives:

- 1) I express my sincere appreciation and gratitude towards all Team Members for their dedication and hard work for the previous year.
- 2) I recognize Team Members that deserve individual recognition.
- 3) I reflect on the previous year as it pertains to business and productivity.
- 4) I talk about what makes our company the local leader in the financial and tax preparation services industry and how we can improve as a Team and as a company to make our company greater and more successful.
- 5) I forecast what the future looks like for TCL Financial & Tax Services.

Last year, we added a total of five new Team Members to the company!

Of the five new Team Members, three of them were hired for the Customer Service Representative (CSR) position. We welcomed to the Team, **BrittiNi Eation, Debra Perkins, and Quanda Brooks!** Let me elaborate on these three ladies.

First, we have **BrittiNi Eation**. Yes, the “N” is capitalized. Trust me, if you do not capitalize that one letter, she will definitely let you know. Ms. Eation was recruited by her sister, Office Manager and Veteran Tax Advisor, **Veronica James**. I must say, Ms. Eation’s personality will brighten any room. She is full of energy and definitely possesses the attitude and temperament of a CSR.

Next, we have **Debra Perkins**. Ms. Perkins is what some would label as a person with a very “kind soul.” She has a calm demeanor and is willing to adapt to any situation at any given time. One thing I love about Ms. Perkins is that she is reliable. Whenever she was needed, even on her off days, she was available. Another thing I love about Ms. Perkins is that she loves to ask questions. Most people will attempt to complete a task without fully understanding the assignment, but not her. That is a quality that I wish a lot of people would possess. Like I always say, “It takes more time do it wrong than right.”

Finally, we have **Quanda Brooks**. I have known Ms. Brooks and her entire family for years. Not only is her family awesome, but she is as well. The saying, “The apple doesn’t fall far from the tree,” truly

applies to her. Not only does she have a youthful personality, she takes whatever tasks that are placed before her very seriously. Like myself, she does not halfway do anything!

We also added two new Tax Advisors after completing and passing our 2021 Income Tax Course, “The Fundamentals of The Income Tax.” We welcomed to the Team, **Tommie Smith** and **Victoria Louisville**! Let me also elaborate on these two ladies.

First, we have **Tommie Smith**. After taking our course, she earned the title of Star Student (#3 Student of the Class). In addition, she was honored for having Perfect Attendance (Never Missed a Class Period). I must say, Ms. Smith did an excellent job for her first year as a Tax Advisor. She was very detailed when preparing tax returns, and the clients absolutely loved her. Despite her being the oldest person on our Team and a senior citizen (which she constantly keeps reminding me for some odd reason), I felt like she kept all of us youthful with her electrifying and inspiring attitude. In addition to the previously mentioned accolades, Ms. Smith also earned the “Roger Bannister Award.” This award is given annually to one student of the Income Tax Course who shows extraordinary abilities and/or does the impossible when it pertains to the class. Great job Ms. Smith. You are definitely “Extraordinary”...in a good way!

Next, we have **Victoria Louisville**. After taking our course, she earned the title of Valedictorian (#1 Student of the Class). To be honest, I knew she had a huge chance in gaining this honor. I initially met Ms. Louisville years ago, and after encountering her years later, I tried to convince her to take the course, and believe me, it took some convincing. Throughout the course, she would constantly have a “poker face,” so I was unsure if she was grasping the information I was teaching. I guess you can not judge a book by its cover, because she had to grasp it all to become the Valedictorian of the class. Ms. Louisville was a great Tax Advisor for her first year. She was always willing to learn. Even when she did not have a client, she would shadow other Tax Advisors while they were preparing tax returns. If “Ready to Learn” was a person, it would be Ms. Louisville.

Team, the primary service that our company offers is tax preparation, and the slogan for that particular service is, “**We Don’t Just Do Taxes...WE KNOW TAXES.**” Even though that is our primary service, I want all of us to understand that, **We specialize in more than just Tax Preparation...** In saying that, I want all of us to begin to start branding and recognizing our company slogan that I introduced last year. Our company slogan is:

“Before you call anybody about your Business, Finances, Money, or Taxes...CALL US.”

Overall, our company offers 12 different services to the public, which include:

- | | |
|-------------------------------------|---|
| ▶ Budgeting Techniques | ▶ Identity Theft Insurance |
| ▶ Business Bookkeeping | ▶ Life Insurance |
| ▶ Business Start-Up and Development | ▶ Notary Public |
| ▶ Credit Restoration | ▶ Pre-Paid Legal Protection |
| ▶ Debt Elimination Techniques | ▶ Saving for Retirement |
| ▶ Estate Planning | ▶ Tax Preparation (Individual and Business) |

Business Bookkeeping and Credit Restoration were the only services that had not been implemented, but as of today, our Business Bookkeeping Services have been introduced to the public. In regards to that service, please congratulate **BrittiNi Eation** and **Tommie Smith**, who will be spearheading these operations. Ms. Eation’s titles are now Business Bookkeeping Specialist and Customer Service Representative (CSR) and Ms. Smith’s titles are Business Bookkeeping Specialist and Veteran Tax Advisor. Congratulations ladies! I know that you will do an awesome job in your new position.

I am still working out some minor details in regards to the Credit Restoration Services, but once those services are added, **BrittiNi Eation** will also be spearheading those operations.

If there are any Team Members that would like to be a part of and learn any of the financial services we offer, please contact me to schedule a meeting.

To elaborate on brand new positions within our company, I must announce a promotion that was recently given. Congratulations to **Charity Rogers** for being added to our management team! Due to her ability to train others, energetic attitude, experience, knowledge, and professionalism, Ms. Rogers definitely deserves this promotion.

Team, I want to further explain and reiterate other titles that I introduced last year for our Tax Advisors. The titles are based on the number of Tax Seasons they have been with our company.

Tax Advisors in their 1st Tax Season with our company will have the title, Tax Advisor. Last year, we had two on our Team. They were **Tommie Smith** and **Victoria Louisville**. Both of you ladies did an amazing job in your first year as a Tax Advisor!

Tax Advisors in their 2nd, 3rd, 4th, and 5th Tax Season with our company will have the title, Veteran Tax Advisor. Last year, we had two on our Team. They were **Dr. Tamekia Stewart** and **Veronica James**. Both of you ladies are awesome Veteran Tax Advisors!

Tax Advisors in their 6th Tax Season and beyond with our company will have the title, Master Tax Advisor. Last year, we had three on our Team. They were **Charity Rogers**, **Prince Trotter, Jr.**, and **Shikeitha Robinson**. All three of you have reached the peak in regards to the title of a Tax Advisor. All of you are incredible Master Tax Advisors!

Customer Service Representatives (CSR) will be titled as Customer Service Representative (CSR), regardless of the number of years with our company. Last year, we had three on our Team. They were **Brittini Eaton**, **Debra Perkins**, and **Quanda Brooks**. It is no secret that this is my favorite position within our company. All of you possess the qualities that I look for in this position, and you also exemplify the nickname I have given the CSR, "The CEO of First Impressions."

Business Owners will be titled as Business Owners, regardless of the number of years with our company. Last year, we had three on our Team. They were **Katherine Thompson** (Byram location), **Marion Canada** (Medgar Evers Boulevard location), and **Sequoia Blocker** (Byram location). You three ladies have taken the ultimate leap within our company by taking advantage of the Business Partnership Opportunity. Each year, your location grows in regards to clientele. Remember, success does not happen overnight. Your dedication, faith, hard work, and perseverance is definitely paying off. I am honored to be your partner in this business!

Team Leaders (Office Managers) will be known as the above titles in addition to their Team Leader (Office Manager) title. Last year, we had four on our Team. They were **Prince Trotter, Jr.** (Office Manager and Master Tax Advisor), **Shikeitha Robinson** (Office Manager and Master Tax Advisor), **Dr. Tamekia Stewart** (Office Manager and Veteran Tax Advisor), and **Veronica James** (Office Manager and Veteran Tax Advisor). You four individuals are great leaders in assisting me in ensuring the guidelines and standards of our company are upheld. I consistently say that a leader should always be able to be pointed out in a crowd. Even though each of you leads differently, there is no doubt that every one of you, in a crowd, will be pointed out.

Team, I want each of you to consider the Business Partnership Opportunity that the company offers. I must say that "Being your own Boss." is very rewarding in so many ways. With the amount of support you will receive from me, fellow Business Owners, and Team Members, it is almost impossible for you to fail. Keep in mind, this is an opportunity that you can do while keeping and maintaining your existing job if you have one. Also, it is not a requirement that you have a brick and mortar location. You can have a home-based, virtual TCL Financial & Tax Services location. For more details and information, please visit our website or contact me to schedule a meeting.

Team, if you have noticed, when referencing our Office Manager and Veteran Tax Advisor, **Veronica James**, I have been using the last name James versus Eaton. She has expressed to me that she now wants to be referenced by her married last name of James. Please honor her wishes. Also, she and her husband, Charles, just welcomed their first child (son) on December 6, 2022. Welcome to the world, Charles Edward James, III.

At this time, I want to recognize all of the Team Members who will be receiving Service Awards.

Our Service Awards are given out annually in January and are for those Team Members who have been with our company for 3, 5, 7, 8, 9, 10, etc. Years. Recipients are presented with a Service Award Certificate, an array of gifts, and a substantial VISA Gift Card.

This year, we will be honoring and presenting seven Team Members with Service Awards.

- 1) **Veronica James** for **3 Years** of dedicated service
- 2) **Marion Canada** for **5 Years** of dedicated service
- 3) **Charity Rogers** for **7 Years** of dedicated service
- 4) **Shikeitha Robinson** for **7 Years** of dedicated service
- 5) **Sequoia Blocker** for **10 Years** of dedicated service
- 6) **Prince Trotter, Jr.** for **11 Years** of dedicated service
- 7) **Katherine Thompson** for **12 Years** of dedicated service

Keep in mind, if you read the criteria above, after 7 Years of dedicated service, you will receive a Service Award every year afterwards. In saying that, **Charity Rogers, Shikeitha Robinson, Sequoia Blocker, Prince Trotter, Jr., and Katherine Thompson** will receive Service Awards every year in January.

I thank each of you for your dedicated service, and I look forward to presenting each of you, as well as the Team Members not mentioned, with Service Awards in the future.

Team, in the past, we acknowledged a Team Member's time with our company and also issued Service Awards based on the number of Tax Seasons. From this point forward, we will no longer calculate these items by the number of Tax Seasons. Instead, we will calculate and use the term, Years, when referring to these items. The only criteria that will be based on the number of Tax Seasons is for the titles of Tax Advisor, Veteran Tax Advisor, and Master Tax Advisor, as mentioned earlier.

At this time, I want to discuss my perception of the year of 2022 for our company outside of the things I just mentioned.

Let me start in January, with the beginning of Tax Season 2021. All of our Tax Advisors, Veteran Advisors, Master Tax Advisors, and Business Owners can attest that since Tax Season 2018, preparing tax returns has become very different, but because we live by our tax preparation slogan, **"We Don't Just Do Taxes...WE KNOW TAXES,"** what other individuals and companies in the tax preparation services industry would consider complex and complicated, we just consider it challenging. I have said it before about other tax seasons, but Tax Season 2021 was really one for the record books. Despite it being challenging, we were still able to master all of the new tax law changes. The reason for that is, our Tax Advisors, Veteran Advisors, Master Tax Advisors, and Business Owners attended our 2021 Income Tax Course, our 2021 Advanced Income Tax Course, practiced tirelessly, and faithfully studied our Reference Guides. Despite how challenging, complex, and complicated any tax laws become, we will always live by our tax preparation services slogan!

Following Tax Season 2021, I worked diligently to incorporate the last two services, Business Bookkeeping and Credit Restoration into the company's menu. Again, Business Bookkeeping Services has been added, and I will let you know very soon when Credit Restoration Services are available.

In regards to entertainment and fun, last year we had our annual company gathering on Saturday, October 29, 2022 and Sunday, October 30, 2022. If you did not attend this event, you missed having a lot of fun. In the past, we normally go out of town for the gathering, but this time we stayed locally, which in my opinion, made it even more enjoyable. If you did not attend, go to our GroupMe page during those dates to view the memories we captured on camera. Trust me, you do not ever want to miss an event that includes the Team at TCL Financial & Tax Services.

Team, let me end my state of address by talking about what the future looks like for TCL Financial & Tax Services.

As mentioned earlier, I am putting the finishing touches on our Credit Restoration Services. Soon, our company will be offering 12 essential financial services to individuals and businesses nationwide.

Team, remember, **We specialize in more than just Tax Preparation...** As stated earlier, I want each of us to start branding and recognizing our company slogan:

“Before you call anybody about your Business, Finances, Money, or Taxes...CALL US.”

Everyone on our Team should know our company’s established date of January 5, 2004. This month made 19 years of us being in business. That is a huge accomplishment! Also, you should be able to navigate through our website effortlessly and know every detail and item listed on it fluently. Essentially, I want each of you to know our website backwards and forwards...Even with your eyes closed!

Finally, another thing that I have been working on tirelessly is branding and marketing. I have vowed to invest more energy, resources, and time into making TCL Financial & Tax Services a household name. Some of the strategies that have already been implemented are:

- 1) Attending more speaking engagements to promote our company
- 2) Creating a customized, one-of-a-kind, keepsake calendar
- 3) Creating signage for each desk in each office inviting clients to Join our Text Alert
- 4) Designing two new name badges for each Team Member
- 5) Distributing more flyers throughout the community
- 6) Increasing the number of radio stations that air our commercials
- 7) Inviting clients to take pictures to post on our social media platforms
- 8) Passing out more business cards when I am out in public
- 9) Posting more frequently on our social media platforms
- 10) Posting more frequently on our text alerts platforms
- 11) Promoting our company more on the show I host, “The TCL Show”
- 12) Utilizing banners year-round

If you have not already, Join our Text Alerts:

**Text TCL2004 to (855) 624-0706
or scan our QR Code below**



Team, I need for all of us to do our part when it comes to branding and marketing our awesome company. The majority of the 12 items I just mentioned, you are in a position to do as well. This quote never gets old, “There is no I in the word Team.” I definitely need each of you to help me make TCL Financial & Tax Services a household name that everybody enjoys and loves!

As a whole, our company continues to grow and prosper. Like I always say, I contribute our growth and success to five key areas:

- 1) Our Excellent Customer Service
- 2) Our Knowledgeable Team Members
- 3) Our Professionalism
- 4) We Always Show Our Clients We Appreciate Them
- 5) **YOU!**

You read it right, **YOU!**

Team, together, let us make 2022 jealous and make 2023 our best year thus far!

I am going to end my state of address like I always do...If there is anything that I can do to assist any of you, please do not hesitate to reach out to me. Always remember, I am only a phone call or text message away. Remember, only text me if my response will require two sentences or less. **I love you Team!**

Sincerely,

Tim C. Lee

Tim C. Lee
CEO & Founder

timclee@TCLFinancialTaxServices.com

(601) 922-2TCL (2825) Office

(601) 842-3226 Cellular

(601) 922-2003 Fax